In association with

Glamorgan Spring Bay

Visitor Information Services Gap Analysis

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David Morgan – The Work Lab

Nick McShane – Stenning & Associates

Task

- The Department of State Growth commissioned this project to
  - identify the specific impacts of the closure of Visitor Information Centres (VICs) in Glamorgan Spring Bay Council (GSBC) area on the local tourism and hospitality industry and visitors
  - develop a decision pathway to guide relevant stakeholders in determining the future of visitor information services in the GSBC area

Proposed decision pathway

1. Identify
- Agree on scope of problem
- Agree extent of impacts
- Agree on decision makers involved

2. Contextualise
- Agree on what we know
- Agree relevant barriers/enablers
- Agree on stakeholder roles
- Agree decision goals and criteria

3. Explore
- Identify strategic options
- Identify costs, advantages, disadvantages, risks
- Assess against decision criteria

4. Decide
- Rank options
- Determine preferred option(s)
- Determine communication strategy

5. Action
- Develop implementation and evaluation plan
- Establish governance arrangements
- Implement preferred option

6. Evaluate
- Monitor performance of option
- Undertake regular evaluations and make adjustments where required

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1. Identify the Problem

- The East Coast has a number of accredited VICs operated by local government
  - GSBC VICs at Bicheno, Swansea and Triabunna
  - Break O'Day Council (BoDC) VIC at St Helens
- GSBC is closing its three VICs post October 2020
  - GSBC has announced a focus on core activities and measures to ensure it operates within budget
  - One of those measures is to divest itself of its three VICs by 31 October 2020
    - Swansea and Bicheno VICs are currently closed, but are expected to re-open in the coming weeks
    - Triabunna VIC currently operating to support Maria Island Ferry operations
  - GSBC is moving to focus on providing support to all industries rather than specific sectors
- The East Coast tourism and hospitality industry is concerned that the absence of visitor information services caused by the GSBC VICs closure will have adverse effects in an industry environment challenged by COVID-19 impacts
- Clarity is required on the impact that the VIC closure will have on visitor information services

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1. Identify Decision Makers

- State Government
  - Tourism Tasmania
    - Principal funder of East Coast Tourism
    - Contributes funding to major VICs (Hobart/Launceston) and TVIN
    - Chair, T21 Steering Committee and Co-Chair of Premier's Visitor Economy Advisory Council
  - Department of State Growth
    - Secondary funder of East Coast Tourism
    - Supporter of State Government supply strategies for tourism and hospitality sector
  - Other agencies/GBEs e.g. PWS, TasPorts (re Triabunna)
- Local Government
  - Current operator of East Coast Visitor Information Centres
  - Contributes funding to VICs and East Coast Tourism
  - Support for economic development in relevant municipalities
- Tourism and hospitality industry
  - East Coast Tourism (Regional Tourism Organisation)
  - East Coast tourism and hospitality operators

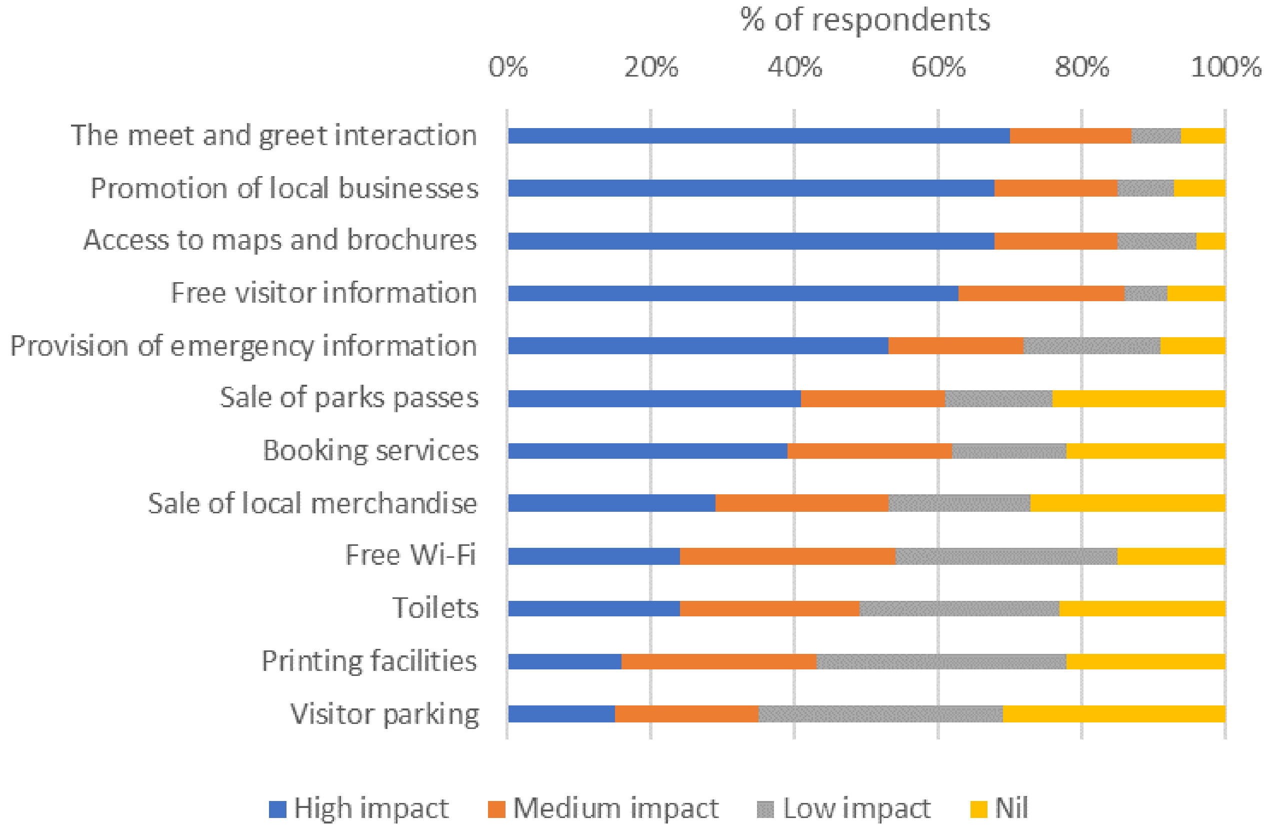
1. Identify Impacts

- The following range of services was identified and validated as being provided by GSBC VICs

Services	Bicheno	Swansea	Triabunna
Primary Services			
Free visitor information services	Yes	Yes	Yes
Booking services	Accommodation Bus Spirit of Tas	Accommodation Bus Spirit of Tas	Accommodation Bus Spirit of Tas Maria Is. Ferry
Visible and impartial visitor welcoming service to local region (meet and greet interactions)	Yes	Yes	Yes
Visitor access to maps and brochures	Yes	Yes	Yes
Promotion of local businesses to visitors	Yes	Yes	Yes
Sale of National Parks passes	Yes	Yes	Yes
Sale of merchandise (e.g. souvenirs, locally produced goods, etc.)	Yes	Yes	Yes
Ancillary Services			
Visitor access to internet	Yes	Yes	Yes
Visitor access to public facilities	Toilets	Toilets	Toilets Showers Cloakroom
Free visitor car parking	Yes	Yes	Yes
Emergency information (medical, bushfires, floods etc)	Yes	Yes	Yes

1. Identify Impacts

- Industry operator survey (144 respondents) highlighted operator perceptions of the service gaps that will arise from GSBC VIC closures (did not measure actual impact on operations)



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1. Identify Impacts

- The top 5 service gaps perceived to arise from GSBC VIC closures are
  - the meet and greet interactions (70% respondents)
  - promotion of local businesses (68% respondents)
  - access to maps and brochures (68% respondents)
  - free visitor information (63% respondents)
  - provision of emergency information (53% respondents)
- Discussions with stakeholders indicated that the loss of human interaction components of VIC services will be the most significant impact

1. Identify Impacts

- The top 5 service gaps are consistent
  - across all industry operators regardless of their location
    - ➢ The exception was industry operators near Triabunna VIC indicated the sale of parks passes were a higher impact service gap than the provision of emergency information
  - across all tourism/hospitality business types
    - ➢ The exception was that booking services were a higher impact service gap than provision of emergency information for
      - hotel / motel / caravan parks
      - tour / transport operator
      - backpacker / youth market

2. Context – What we know

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Economic

- The impact of COVID-19 has severely disrupted Tasmania's visitor economy 'pipeline'
  - Local component of pipeline has just re-opened
  - Interstate and international components still closed
- Current indications are that recovery of the visitor economy will be slow in a COVID-19 impacted environment
- Local Governments are under financial pressure re services they support
  - Exacerbated due to COVID-19 impacts

Visitor Economy Strategies

- Visitor economy growth has been guided by
  - State-wide
    - T21 - Tasmanian Visitor Economy Strategy
    - Tasmanian Visitor Engagement Strategy
  - Regional
    - Great Eastern Drive – involves Glamorgan Spring Bay and Break O'Day Council areas
    - Destination Management Plan 2013 (not used)
  - Local
    - Destination Action Plans

2. Context – What we know

- East Coast VICs have reported high level of usage

Year	Visitor usage GSBC VICs	Visitor usage BoDC VIC	Total East Coast VIC Usage	Visitor Numbers - East Coast	% Total East Coast VIC Usage
2018/19	146,853	31,866	178,719	355600	50%
2017/18	118,329	31,034	149,363	389700	38%
2016/17	95,965	34,685	130,650	378100	35%
2015/16	82,877	40,249	123,126	334800	37%
2014/15	79,824	41,631	121,455	315300	39%
2013/14	81,127	36,648	117,775	281100	42%

Sources: Visitor Usage of VICS: Provided by Dept. of State Growth from East Coast Tourism
Visitor Numbers - East Coast: Tasmanian Visitor Snapshot, Tourism Tasmania

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2. Context – What we know

VICs generally

- VICs are part of the Tasmania Visitor Information Network
  - 15 accredited (yellow i) VICs & 7 non-accredited
  - Accreditation imposes a number of restrictions on VICs that contribute to their base cost
  - Some stakeholders and some reviews consider that the accreditation model is out of date and that VICs do not need to be accredited
- VICs do not drive growth in the number of visitors to a region
  - VICs seek to expand and disperse the value of visitors across their region
  - Their effectiveness in achieving this is not measured
- VICs can provide range of services
  - Primary visitor information related services
  - Ancillary services
  - Some are co-located with
    - Attractions – e.g. History rooms (St Helens)/Museums (Swansea)
    - Important community facilities/activities (e.g. Geeveston community hub)

- COVID-19 impacts have caused the temporary closure of VICs across Tasmania
- Some other local council operated VICs are also closing or reviewing their VICs – e.g. Huon Valley Council
- The operation of VICs in Tasmania has been subject to a number of reviews over a number of years that have consistently
  - Recognised benefit of visitor information services, but limitations of current (Bricks and mortar) VIC model
  - Identified new model is needed that
    - re-imagines provision of visitor services to reflect current visitor needs
    - measures effectiveness of visitor information services

2. Context – What we know

Financial

- All the East Coast VICs operate at a loss
- Staffing costs are the largest expense for these VICs
  - 71% of operating expenses in 2019
- Accreditation of VICs comes at a cost as they must meet minimum accreditation requirements
- VICs offer many of their services for free (i.e. the provision of information)
- VICs main own-source revenue is generated through merchandise sales and bookings
  - Covered 52% of total operating costs in 2019
- Continued reliance on local government for funding is a risk to the current VIC model

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2. Context – What we know

Decision context summary

- Determining the future of visitor information services in the local/regional context is complex
  - Many stakeholders involved in visitor information provision
  - No clear ownership of visitor information service role
  - Current VICs are a legacy model that has not moved with the times
- Time and thought is required
  - Industry has been significantly disrupted by COVID-19 impact
    - Current situation is an opportunity for fundamental re-think
  - There are many options – no right answer easily identified
  - Need trial and error approach to allow solution to emerge

2. Context – Barriers/Enablers

Barriers

- Ownership of visitor information service provision – many masters/jurisdictions
- Reduced financial capacity of local government to support VICs
- Return on investment of current VIC model not measured
- Focus on bricks and mortar model (not best of breed)
- Funding model for Regional Tourism Organisations
- Potential for industry goodwill and capacity to diminish over time

Enablers

- Interconnected State and regional brand and product
- Current strong industry goodwill and capacity
  - Recognition that all tourism and hospitality operators have a stake in visitor information services
- Local government support for industry development
- Digital technology
- Pending review of East Coast Destination Management Plan

2. Context – Stakeholder Roles

- Stakeholder roles in context of current problem
  - State Government
    - State-wide visitor information strategy
    - Base funding
      - Of regional tourism organisations
      - To support provision of visitor information services
    - Visitor assets covered by multiple agencies (PWS, TasPorts etc)
  - Local Government
    - Provision of local government services and infrastructure to its community and visitors
    - Support for local economic development (broad and/or sector specific)
  - Regional Tourism Organisations (East Coast Tourism)
    - Leadership and advocacy for the tourism and hospitality industry in the region
    - Support for industry development
    - Marketing, including support for the provision of visitor information services
  - Tourism and hospitality operators
    - Provision of tourism and hospitality services to visitors
    - Support for local and regional industry strategies, activities and programs

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2. Context – Decision Goals/Criteria

Decision Goals

Solution option(s) will

1. Align with and support collaboration on state, regional and local industry vision and associated visitor engagement strategies
2. Increase visitor yield, dispersal and satisfaction
3. Build on current operator capabilities and goodwill
4. Have stable governance and be financially sustainable
5. Be scalable, integrated, measurable
6. Be flexible to changing visitor information needs
7. Enable communities to support visitor information services

Decision Criteria

Option(s) to be ranked according to

a) Degree to which they support regional and local destination focus and collaboration

b) Capacity to increase visitor yield, dispersal and satisfaction

c) Capacity to harness operator capabilities and goodwill

d) Capacity to be financially responsible & sustainable

e) Degree to which outcomes are measurable

f) Capacity to support future visitor information service evolution

Appendix A – Detailed Survey Results

- The survey was issued by East Coast Tourism to all operators on its database
  - There were 144 survey respondents
- Based on 2018 Tourism Research Australia local government profiles, there were 224 tourism operators on the East Coast
  - 119 in GSBC
  - 105 in BoDC
- The sample size is statistically significant for the population of operators on the East Coast with a confidence level of 95% (confidence interval of 5)

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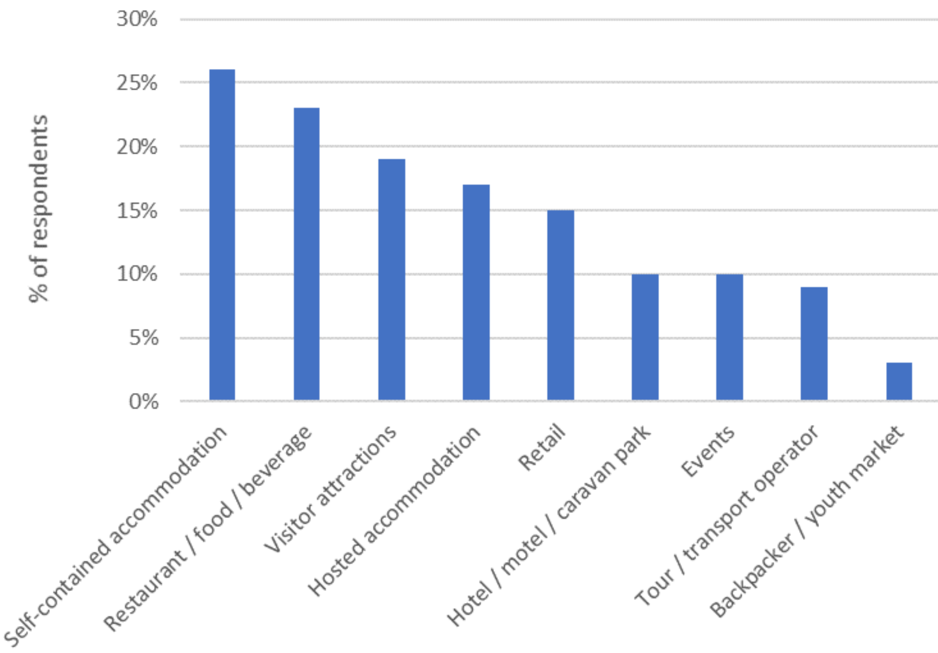
Appendix A – Detailed Survey Results

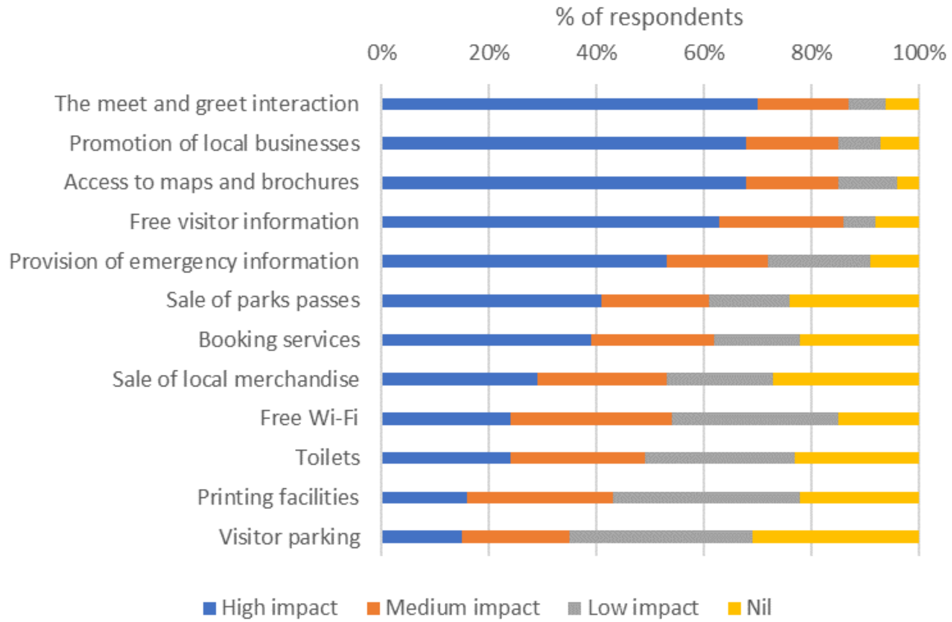
- GSBC VIC closest to primary business location
  - 59% respondents were closest to Bicheno
    - ➢ This likely reflects operators in BoDC responding to survey
  - 22% respondents were closest to Triabunna
  - 19% respondents were closest to Swansea

- Tourism/hospitality business types - respondents

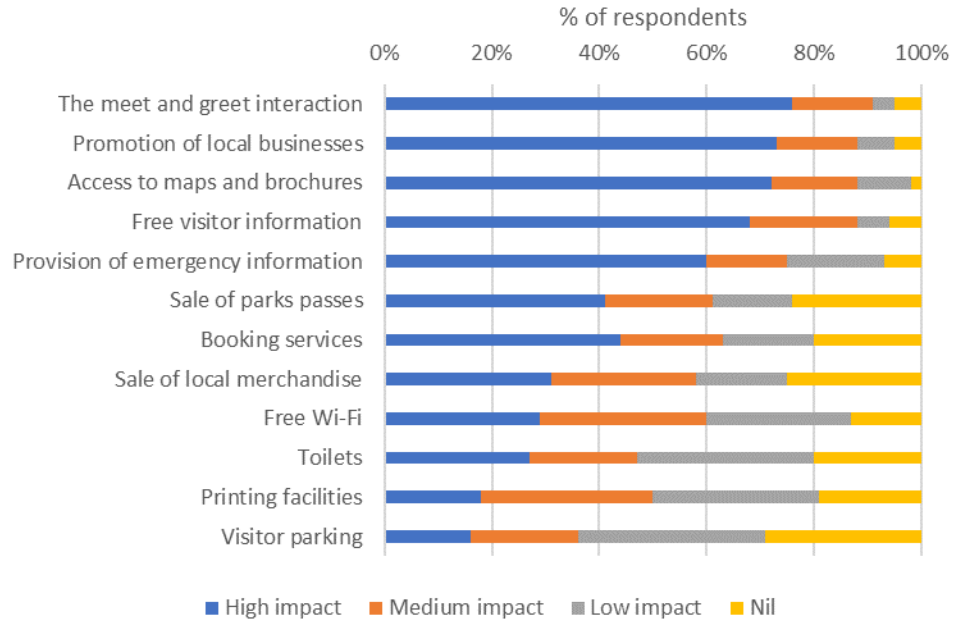


Appendix A – Detailed Survey Results

- Perceived service gap impacts from VIC closures – all respondents

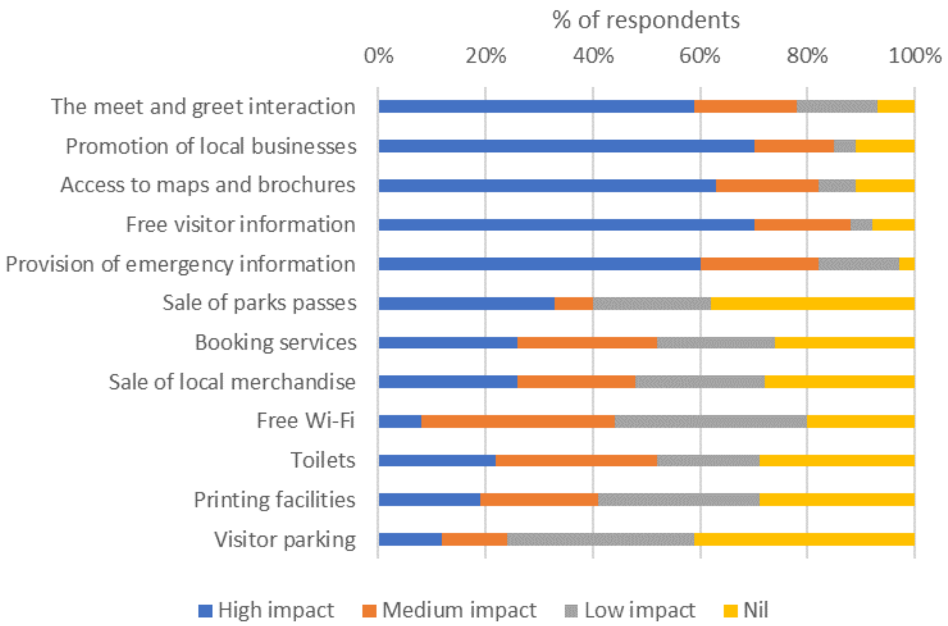


- Perceived service gap impacts - respondents closest to Bicheno VIC

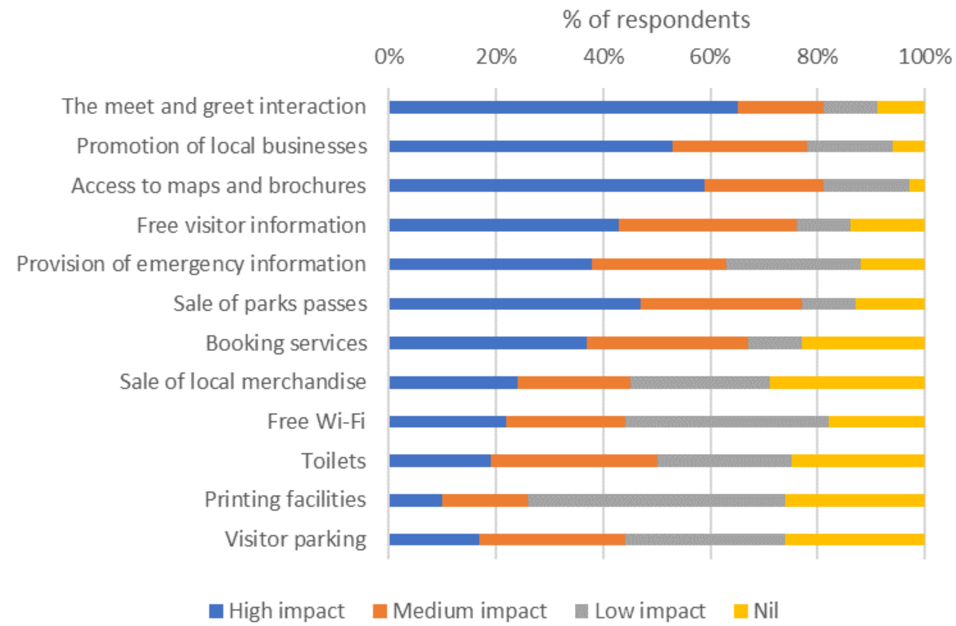


Appendix A – Detailed Survey Results

- Perceived service gap impacts - respondents closest to Swansea VIC



- Perceived service gap impacts - respondents closest to Triabunna VIC



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Appendix A – Detailed Survey Results

- Most significant service gaps perceived by tourism/hospitality business type

Business type	% Total Respondents	Most significant service gap	% business type
Self-contained accommodation	26%	Promotion of local businesses	63%
Restaurant / food / beverage	23%	Promotion of local businesses	72%
Visitor attraction	19%	The meet and greet interaction	78%
Hosted accommodation	17%	Promotion of local businesses	72%
Retail	15%	The meet and greet interaction	91%
Events	10%	The meet and greet interaction	67%
Hotel / motel / caravan park	10%	Access to maps and brochures	67%
Tour / transport operator	9%	The meet and greet interaction	83%
Backpacker / youth market	3%	Access to maps and brochures	100%

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Appendix A – Detailed Survey Results

- Top 5 high impact service gaps for businesses that provide self-contained accommodation
  - promotion of local businesses (63%)
  - the meet and greet interaction (58%)
  - access to maps and brochures (57%)
  - free visitor information (55%)
  - provision of emergency information (50%)
- Top 5 high impact service gaps for businesses that provide restaurant / food / wine
  - promotion of local businesses (72%)
  - access to maps and brochures (67%)
  - the meet and greet interaction (66%)
  - free visitor information (58%)
  - provision of emergency information (45%)
- Top 5 high impact service gaps for businesses that provide visitor attractions
  - the meet and greet interaction (78%)
  - free visitor information (73%)
  - promotion of local businesses (70%)
  - access to maps and brochures (63%)
  - provision of emergency information (56%)
- Top 5 high impact service gaps for businesses that provide hosted accommodation services
  - promotion of local businesses (72%)
  - access to maps and brochures (68%)
  - the meet and greet interaction (64%)
  - free visitor information (58%)
  - provision of emergency information (52%)

Appendix A – Detailed Survey Results

- Top 5 high impact service gaps for businesses that provide retail services
  - the meet and greet interaction (91%)
  - access to maps and brochures (86%)
  - promotion of local businesses (81%)
  - free visitor information (80%)
  - provision of emergency information (62%)
- Top 5 high impact service gaps for businesses that provide hotel / motel / caravan parks
  - access to maps and brochures (67%)
  - promotion of local businesses (60%)
  - the meet and greet interaction (53%)
  - booking service (47%)
  - free visitor information (47%)
- Top 5 high impact service gaps for businesses that provide event services
  - the meet and greet interaction (67%)
  - promotion of local businesses (67%)
  - free visitor information (64%)
  - provision of emergency information (60%)
  - access to maps and brochures (60%)
- Top 5 high impact service gaps for businesses that provide tour / transport operation services
  - the meet and greet interaction (83%)
  - promotion of local businesses (77%)
  - booking services (69%)
  - free visitor information (67%)
  - access to maps and brochures (67%)

Appendix A – Detailed Survey Results

- Top 5 high impact service gaps for businesses that provide backpacker / youth market services
  - access to maps and brochures (100%)
  - promotion of local businesses (80%)
  - the meet and greet interaction (80%)
  - free visitor information (80%)
  - booking services (80%)

Appendix A – Detailed Survey Results

- Other tourism/hospitality activities undertaken by respondents
  - Guiding
  - Online access centre

- Other services provided by GSBC VICs
  - Showcasing local history (1 respondent)
  - Community liaison (2 respondent)
  - Travel conditions (1 respondent)